

**Job** NO **1**

**Building Your  
Business in Ohio**

**Ohio**

**Third Frontier**

Innovation Creating Opportunity

**JobsOhio Network Program**

**FY2012**

**Regional Partner Proposal  
Evaluation Report  
August 2011**

### **Proposal Review Project**

JobsOhio is a visionary new organization being established to propel job growth and economic expansion in Ohio. To be effective in implementing a comprehensive economic development strategy, JobsOhio will act through a coordinated network of regional partners structured around six geographic regions. In addition to defining the partnerships by region, each organization will have the responsibility for supporting, both on a regional and statewide level, growth in targeted industry sectors.

The Ohio Third Frontier (OTF) is offering grants to selected regional partner organizations selected to provide regional leadership in the development and implementation of the JobsOhio network. OTF requires an independent evaluator's review of the regional partner proposals to assess the relative merits of the proposals and whether they meet the intent, goals, and purposes of the JobsOhio Network Program.

This report is based on work performed by Invantage Group, chosen by the Ohio Department of Development ("Development"), for its competencies in the related areas of technical and business reviews. Invantage Group provides a suite of innovative market development and business strategy services to help organizations succeed through better planning and implementation. By understanding market development, critical metrics, technical requirements, and customer-centric strategies, we assist clients to leverage assets in order to optimize market entry and growth opportunities. A fundamental part of our business plan development and evaluation experience has focused on market entry, commercialization, and team development.

#### ***Mr. Ted Bernard***

Mr. Bernard has extensive experience in analyzing markets and consumer behavior in order to develop market entry and growth strategies, including a deep understanding of venture development and how public policy impacts private capital formation.

To enhance and deepen the review process, Development made available an additional review resource throughout the evaluation process. Mr. Donald Jakeway, currently President and CEO of Brooks City-Base in San Antonio, Texas and former Director of the Ohio Department of Development (1991 – 1997), provided invaluable insights and assistance to the evaluator. His considerable knowledge and background experience in economic development were essential components in the evaluation process.

## JobsOhio Program Network

### Vision

JobsOhio is being established to accelerate job growth and economic expansion in Ohio. The JobsOhio Network program will include six regional partners responsible for defining, building, and executing a regionally-based economic development strategy. In addition, the regional partners will be accountable for promoting targeted industry sectors which will sustain our global competitive advantage in company and product formation, job creation, and economic growth.

### Objectives

JobsOhio Network Program regional partner organizations will be charged with the following roles and responsibilities:

- To serve as the JobsOhio regional office;
- Within a framework defined by JobsOhio, to develop, update and communicate an economic development strategy for the region;
- To build a highly functional network of local partners to generate qualified leads and advanced technology commercialization;
- To develop an operational model for business recruitment, retention, and expansion, and the transition of technology into new companies and products;
- To define and implement a common set of standards to evaluate and qualify investment opportunities; and,
- To define shared goals, deliverables and associated metrics and institute a network-wide performance measurement and reporting system.

Within a two year start-up period, JobsOhio Network Program regional partners are expected to provide a regional strategy, a regional network design with key collaborators, and an operating structure designed to support recruitment, retention and expansion, technology commercialization, and investment within the region.

### Eligible Proposals

The goals of the JobsOhio Network Program require coordination at the six regional levels, as defined by Development. A number of regionally-based economic development organizations exist throughout Ohio, with a breadth and depth of capabilities that align well with the mission and goals of JobsOhio. Leveraging the knowledge and assets of these local economic development organizations and their network of relationships with businesses, research organizations, financial institutions, economic development intermediaries and local

governments is critical to accelerating the launch of JobsOhio and to its long-term sustainable success in job creation and economic expansion.

Development expects to fund one regional partner from each of the six regions. The six organizations eligible to submit a proposal as the Lead Applicant, their region and targeted industry sectors are as follows:

- Appalachian Business Council, Southeast Region
- Cincinnati USA Partnership, Southwest Region
- Columbus 2020!, Central Region
- Dayton Development Coalition, Western Region
- Regional Growth Partnership, Northwest Region
- Team NEO, Northeast Region

### **Funding and Cost Share**

Development anticipates awarding up to \$24 million in grants for the FY2012 JobsOhio Network Program. The amount of funding requested will be based on the expected level of business activity and lead generation activity in the targeted industry sectors in each region being served. There will also be a critical assessment of the capacity that currently exists in the region to work with these industries in support of JobsOhio.

In both Year 1 and Year 2 of the funding, the monetary value of the Cost Share commitment must be at least one dollar (\$1) for every one dollar (\$1) of State Grant Funds requested (i.e., a ratio of 1:1). The Lead Applicant must insure that the Cost Share ratio requirement is met or exceeded, and that all proposed Cost Share and reporting requirements are met.

### **Proposal Evaluation Criteria**

Section 4 of the JobsOhio Network Program RFP details important elements for the proposals and the evaluation criteria to be considered in determining the creditability of proposals for funding. Some of the most important evaluation criteria include the following:

- Alignment of the Proposal with the JobsOhio Network Program purpose, goals, objectives, eligibility, and funding requirements.
- Quality of the responses to the requirements outlined in the Statement of Work, Performance Goals, and Budget.
  - Degree to which the proposed Project will help build the State's economic development activities, including the retention, expansion and recruitment of businesses with high potential for job and wealth creation in the state;
  - Degree to which the proposed Project will leverage statewide and regional strengths, including integration with technology and entrepreneurial assets;

- Degree to which the proposed Project will perform the expected Network regional partners' roles and responsibilities;
- Composition and strength of a regional partner's assembled Network and the ability of the regional partner to meet all of the expected deliverables; and,
- Availability of all resources needed to conduct the work.

Other than meeting the specific criteria outlined in the RFP materials, the amount of funds requested was not a proposal evaluation criterion and did not have a material impact on the reviewer's evaluation.

### **Evaluation Process**

Prior to any independent review, Development staff received and processed proposals, conducting an initial administrative review to ensure that submitted proposals comply with the objective content requirements defined in the RFP. Once the administrative review was finalized, eligible proposals were forwarded to an external evaluator for its independent review.

The multi-step evaluation process provides both a thorough and consistent analysis in order to identify the strengths and gaps within each proposal. The independent evaluation process included the following steps:

- Develop an evaluation paradigm in accordance with the RFP criteria and program goals.
  - Evaluation criteria with scoring ranges and point weighting.
  - Three primary evaluation categories with multiple sub-components.
    - *Organizational capabilities*  
Assess the regional partner's relevant organizational experience and capabilities to represent business interests, especially in the identified strategic industry sectors. This section focused on the overall organizational elements, experience, and/or credible plans which are critical to understanding the regional partner's likely ability develop an operational model to generate qualified leads for targeted business recruitment/attraction, develop an operational model for business attraction, and implement a methodology for evaluating investment opportunities.
    - *Management plan, team, & budget*  
Evaluating the regional partner's key personnel identified, their backgrounds, and any rationale provided regarding the selection of the program management team. This area includes a review of the regional partner's plans for evaluation and assessment of program progress, resource assessment, and budget details. Given the new direction and challenges, it is

essential to consider the ability to deliver given limited funds for administrative support (i.e. ability to leverage existing funds or administrative infrastructure support).

- *Resources and performance history*  
An assessment of any documented regional performance history, whether directly or in aggregation with other regional collaborators and how performance history impacts realistic assumptions and supporting projections for the proposed services.
- Review proposals using a two-stage process.
  - Stage One reviews
    - Conduct a thorough reading of all proposals.
    - Review each proposal in greater detail using the pre-defined evaluation matrix to assign preliminary scores.
    - Compare relative scores to ensure consistent application of criteria.
    - Review discussion by evaluators to reach general consensus
    - Identify gaps or weaker elements and develop questions to applicants addressing these areas.
  - Stage Two reviews
    - Review responses to questions
    - Detailed review within context of initial proposal and additional information
    - Review discussion by evaluators to reach general consensus
    - Assign final scores, rank, and provide supporting documentation for all proposals
  - Preparation of materials for Third Frontier Commission

Proposals were evaluated based solely on the information provided within each regional partner's original submission and subsequent responses to questions.

### **Proposal Evaluation Summary**

The proposals were evaluated, scored, and ranked according to the criteria clearly contained in the program RFP. Based on the expert evaluation and discussions with other participants, the reviewer has offered a recommendation to Development and the OTF Commission to consider funding six regional partner proposals.

The following table provides a summary of all proposals received and recommended for JobsOhio Network Program funding by region.

**Summary of JobsOhio Network Program  
FY 2012 Proposals Evaluated**

<b>Lead Applicant</b>	<b>Region</b>	<b>Project Title</b>	<b>Funds Requested</b>
Appalachian Partnership for Economic Growth	Southeast	Appalachian Partnership for Economic Growth	\$3,000,000
Cincinnati USA Partnership	Southwest	Cincinnati USA Partnership JobsOhio Network Program/Southwest Region	\$4,000,000
Columbus 2020!	Central	Columbus2020! JobsOhio Network Program	\$4,000,000
Dayton Development Coalition	West	JobsOhio Network Program	\$4,000,000
Regional Growth Partnership	Northwest	Northwest Ohio JobsOhio Network	\$4,000,000
Team NEO	Northeast	JobsOhio Network Program - Northeast Ohio	\$5,000,000

The proposals were assessed against the evaluation standards based on the degree to which they met the standards set forth in the RFP and utilized in the evaluation paradigm. The strengths of these recommended proposals outweigh whatever weaknesses or gaps may be present at this time. The following is a brief evaluation summary of each proposal.

**Applicant: Appalachian Partnership for Economic Growth**  
**Title: Appalachian Partnership for Economic Growth**  
**Region: Southeast**

- Despite APEG being a “start-up,” they appear to have a good understanding of the leadership, talent, and resource needs. They will need to work rapidly to attract and retain the needed resources within the desired timeframes, though several interim and longer-term initiatives are already in process. The draft scope of work and related assumptions for the first year activities appear to be thoughtful and appropriate.
- Possibly the area of greatest challenge, though well recognized, is the lack of regional networks to leverage. It does help that there is an honest assessment of gaps and a reasonably clear direction for areas of focus for future efforts. The historical localization of these efforts is clear and they identify the need to focus a more regional approach.

- The region will likely face funding challenges, like any region, but it will have to address them without the legacy of a well-defined regional history. They believe that additional fundraising will accelerate once they have more staff and success stories in place, which may be justified, but they still face many gaps in known funding.

**Applicant: Cincinnati USA Partnership**

**Title: Cincinnati USA Partnership JobsOhio Network Program/Southwest Region**

**Region: Southwest**

- The regional partnership has existed for several years and produced solid results for the region. They recently approved a new regional development strategy and the effort to broaden goals. In order to be successful, they will need to define how to achieve specific JobsOhio goals while successfully coordinating tri-state activities.
- Their past focus has been more on business attraction and there is reasonable evidence that they can develop and implement operational models to achieve desired plans. The proposal outlines a plan for the necessary steps to expand the model to business retention/expansion efforts, as well as to strengthen attraction and commercialization initiatives.
- The proposal includes a sound discussion of collaborations and requirements desired for different areas of the plan. There is some recognition of past under-performance and it will help to have a clear analysis for reasons these issues, though the proposal does include a sound discussion of personnel and resource requirements to achieve goals.

**Applicant: Columbus2020!**

**Title: Columbus2020! JobsOhio Network Program**

**Region: Central**

- The lead organization was created from an extensive effort and includes membership from the key area stakeholders. The partner organizations have ample relevant experience and capabilities in the target areas and they do appear to have put together a strong collaborator network for the primary aims.
- The current economic development strategy was developed from a substantial regional dialogue and collaborative effort. The current regional economic development strategy appears to fit well with the JobsOhio vision, with fairly extensive plans for retention/expansion, attraction, and commercialization.
- The proposal lists several qualitative and a few quantitative performance goals, though the plan will benefit as it develops clearer supports and connections.

**Applicant: Dayton Development Coalition**

**Title: JobsOhio Network Program**

**Region: West**

- There is a well-defined regional network of agencies and activities to represent the desired business and economic development activities. The DDC already exists and is active in coordinating activities across the region.

- A substantial portion of portion of the work on developing a regional economic development plan already exists and there is a well-defined partnership network as the basis for an operational model. It contains an honest appraisal of some past failings and a reasonable approach for correcting any past deficiencies.
- The existing history and sound regional approach enables them to provide probably the best comprehensive historical view of any proposal. The goals are a bit aggressive, but well based on historical performance and improvement plans. The proposal provides several insights into the budgeting process and supporting decisions, including clear breakdowns services.

**Applicant: Regional Growth Partnership**

**Title: Northwest Ohio JobsOhio Network**

**Region: Northwest**

- Regional Growth Partnership (RGP) has existed for several years and has solid relevant organizational experience for regional economic development, though its primary focus appears to have been on business attraction. There are other regional organizations focused on other aspects of development which will need to be coordinated in order to develop a “regionalization” strategy for these other areas.
- While the area does have some experience with regional planning, organizational efforts appear to be fragmented in their approach, with a clear divide between northern and southern sub-regions, and only limited information about coordinating capabilities.
- A wide range of area collaborators are identified, but there is only a basic preliminary plan provided regarding coordination or acquisition of additional resources. The given plans and performance goals are not unreasonable, though initiatives appear to place a heavy reliance on influencing site consultants for business attraction.

**Applicant: Team NEO**

**Title: JobsOhio Network Program - Northeast Ohio**

**Region: Northeast**

- Their existing organization and collaborators have been in existence for several years performing local and regional economic development efforts. The area has a history of regional orientation and resources exist for the continuance or enhancement of the regional economic development strategies. There has been a defined effort to focus on the identified sectors.
- A tracking mechanism for opportunities is outlined and reasonable, though the plan will benefit from a process for on-going evaluation of resources or efforts, as well out outcomes.
- The existing personnel in Team NEO and collaborators bring significant value, though no additional resource requirements were identified. With no additional collaborators identified, there will be a clear need to ensure full cooperation of existing collaborators and greater coordination of activities.

## Conclusion

Based on the deep evaluations conducted during the review process, the reviewer has offered a recommendation on proposals which have sufficiently met the program criteria for consideration of funding in whole or in part. The top scoring proposals did a better job in addressing the specified criteria and demonstrating capabilities to aid the success of the JobsOhio Network Program.

Each proposal has certain merits and gaps, though it should be noted that several proposals rated at the higher end of the scoring range. The lower scoring proposals should not be deemed deficient; rather they will require additional oversight and assistance in helping to define stronger plans for regional collaboration networks and operational models for comprehensive economic development strategies.

Given the information available for assessment, the evaluator sees potential for each of the regional partner proposals, though recognizes the higher rated proposals as better positioned to implement successfully the JobsOhio Network Program throughout its designated region. The evaluation feedback can be used effectively by Development and the JobsOhio Board of Directors as a basis for oversight, assistance, and resource allocation decisions.

Invantage Group wishes to thank the State of Ohio for the opportunity to review these proposals and to provide its recommendations regarding these proposals. It is hoped that the evaluation process provides helpful insights and directions to assist Development and the JobsOhio Board of Directors in the successful development of the JobsOhio Network Program.

---

Copyright © 2011 Invantage Group. All rights reserved.

This report written by:  
Invantage Group  
New Albany, Ohio 43054  
United States of America  
Ted Bernard, Managing Principal

For more information or to obtain additional copies of this report, contact Invantage Group at [info@invantagegroup.com](mailto:info@invantagegroup.com).